Queensland Adventure Tourism

Action Plan 2008–2011

Tourism Queensland
Queensland Government

Foreword

Adventure tourism is one of the fastest growing and most exciting tourism markets in Queensland. In recent years considerable investment has been made to establish, develop and promote high quality adventure tourism product throughout the state.

However to ensure that the adventure tourism industry continues to grow, the Queensland Government has invested in the development of an Adventure Tourism Action Plan.

The Plan has been developed in partnership with key industry stakeholders and Tourism Queensland to provide a clear direction for the future development of adventure tourism to 2011.

The Adventure Tourism Action Plan is part of the State Government's $48 million, ten-year Queensland Tourism Strategy (QTS), dedicated to securing the environmental, economic and social sustainability of the state tourism industry's future.

Under the QTS significant focus has been placed on driving the future of Queensland's tourism industry by building strong and effective private and public sector partnerships. It is only through these partnerships that we can ensure new adventure tourism investment and infrastructure meets the increasing demands of domestic and international visitors.

By understanding the adventure tourism market and identifying its weakness and opportunities we are giving the tourism industry the opportunity to receive the best possible economic and employment returns.

Dive tourism has been recognised as one of Queensland most important adventure tourism segments and we are fortunate to have the world's most amazing natural dive experiences. I am proud to say that this plan will also ensure that we maximize the use of these natural assets while preserving and protecting them for future generations of adventure tourists.

I look forward to working with industry to ensure the outcomes proposed under the attached strategy are delivered over the next three years.

The Hon Desley Boyle MP
Minister for Tourism, Regional Development and Industry

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Disclaimer

Executive Summary

Adventure tourism has become one of the most dynamic and rapidly growing sectors of worldwide tourism. Queensland, with its world-renowned natural areas, offers significant opportunities for adventure tourism development.

Increasingly, tourists are seeking new and enriching adventure experiences from their holiday, and consequently destinations are being chosen not only for their scenery and tourist services, but also for the natural adventure component they provide. Be it white water rafting, SCUBA diving, sea kayaking, rock climbing or hiking, the appealing attribute is the element of active participation.

This action plan has been developed to provide industry stakeholders and Tourism Queensland with a clear direction for the future development and marketing of the adventure tourism sector over the next three years (2008-2011). It is a key market segment strategy that delivers on the vision and actions of the Queensland Tourism Strategy (QTS).

Goals

1. Increase visitor expenditure and length of stay
2. Ensure sustainable development of adventure tourism product
3. Build awareness of Queensland adventure tourism product

Key Strategic Priorities

1. *Improve the profile of adventure tourism in Queensland*
   - Raise awareness of Queensland's adventure tourism experiences to encourage regional dispersal and increase visitation and length of stay
   - Focus on collaborative approaches to marketing and provision of appropriate information to key target audiences
   - Raise awareness of the safety and quality of Queensland's dive products

2. *Encourage development of sustainable product that delivers a Queensland-style adventure experience*
   - Ensure the long-term sustainability of the adventure tourism sector by encouraging the adoption of sustainable business practices
   - Identify and facilitate the development of new tourism adventure product and packages
   - Advocate climate change adaptation and mitigation initiatives for the industry, especially for the dive and snorkel segment
   - Encourage training and development opportunities to strengthen the professionalism and safety standards of the adventure tourism sector
   - Encourage the adoption of Adventure Activity Standards

3. *Improve industry cohesion and partnerships*
   - Facilitate the development of a cohesive industry sector, improving regional partnerships and cooperative product marketing at a local, regional and state-wide level
   - Improve communication and coordination of adventure tourism activities across the state

4. *Improve research availability*
   - Provide consumer research in line with the needs of adventure tourism operators (qualitative and quantitative)
   - Provide market research into the quality and safety of the adventure tourism industry

1 Introduction

Adventure is defined as an activity based primarily outdoors in a natural setting and encompassing an element of risk. The definition of an adventure activity as opposed to a nature-based or ecotourism activity rests with an individual's perception of adventure and what level of risk they consider to be adventurous.

As nature is clearly identified as an important element of many adventure activities, Queensland, with its diverse landscapes and world-renowned natural areas, is well positioned to capitalise on the growing adventure tourism segment.

One of Queensland's greatest strengths is the outstanding diving and snorkelling opportunities on the Great Barrier Reef as well as spectacular shipwrecks and abundance of islands. The range, diversity and quality of experiences ensures that diving and snorkelling is a significant sector of the adventure tourism segment in Queensland.

1.1 Purpose

This strategy has been developed to provide industry stakeholders, government and Tourism Queensland with a clear direction for the future development and marketing of the adventure tourism segment over the next three years (2008-2011).

The Adventure Tourism Action Plan is a market segment strategy that delivers on the vision and actions of the Queensland Tourism Strategy (QTS). The QTS provides a state-wide vision for the sustainable development of tourism over the next 10 years (2006-2016). A partnership between the Queensland Government and the Queensland tourism industry, the QTS reinforces the Queensland Government's commitment to destination management, and enhances the ability to develop and market a Queensland style visitor experience. A copy of the QTS can be downloaded from **www.qldtourismstrategy.com.au**.

It should be noted that some elements of the development and marketing activity undertaken by Tourism Queensland for the adventure tourism sector is already addressed through separate initiatives developed for the ecotourism and backpacking market sectors.

This action plan provides significant opportunities for effective partnerships between industry and government to position Queensland as the premier adventure destination in Australia for domestic and international visitation.

1.2 Communication and Distribution

A highlights version of the Adventure Tourism Action Plan will be distributed to Regional Tourism Organisations, adventure cluster groups and other relevant stakeholders. A copy is also available for download from **www.tq.com.au**.

The full document will be made available as a soft copy to interested parties upon request to Tourism Queensland.

1.3 Defining Adventure Tourism

What is Adventure Tourism?

"A trip or travel with the specific purpose of activity participation to explore a new experience or controlled danger associated with personal challenges, in a natural environment or exotic outdoor setting." [i]

A distinction is often made between "hard" and "soft" adventure tourism.

Soft adventures provide an "adventure" in a unique outdoor setting and involve only a minor element of risk, little physical exertion, and often have an element of education or learning. Examples include: Bushwalking/Hiking; Wildlife Watching; and Hot Air Ballooning.

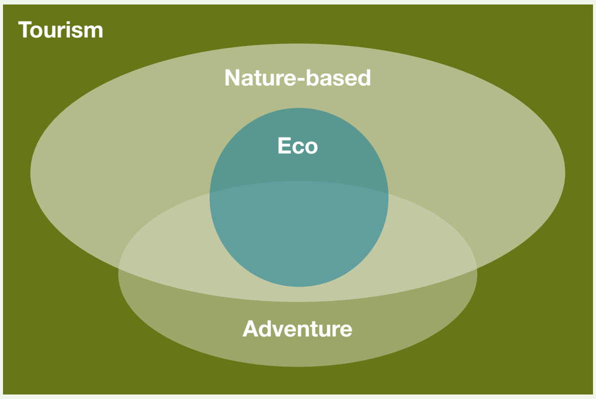
Hard adventures provide a unique experience in an outdoor setting with high levels of excitement and risk that frequently demands a high degree of physical exertion and some level of skill. Examples include: Scuba Diving; White Water Rafting; Bungy Jumping; and Skydiving.

It should be recognised that the interpretation of an adventure activity is based on individual perception, as is the perceived level of risk when categorising an activity as "hard" or "soft".

With the increasing interest in adventure tourism has come the suggestion that a level of "mainstreaming" within the "hard" adventure activities such as white water rafting has occurred, and such activities no longer provide the rush for the hard-core adventurer. This has resulted in the emergence of "Extreme" adventure, with a number of tour operators targeting the more practised adventurers who are seeking even more extreme, adrenalin-packed and challenging experiences such as high altitude mountaineering, survivor style tours and expeditions to remote areas such as the Antarctic.

An overlap exists between the market sectors of adventure, nature-based and ecotourism (refer to Figure 1). Activities such as whale watching and sea kayaking could be described as nature-based, adventure or ecotourism experiences depending on the individual's categorisation of the activity. What may be perceived as adventure by one person to another is not. In essence, the categorisation of any activity is determined in the minds of the consumers rather than by the activity itself.

Figure 1



The youth and backpacking markets are a significant demographic of visitors who participate in adventure activities while in Queensland. However, the adventure segment is not restricted to only backpackers with a broad demographic interested in adventure activities.

Adventure Activities

The adventure tourism sector in Queensland is comprised of a wide variety of hard and soft adventure experiences including:

Abseiling/Rappelling	Hiking/Bushwalking	Scuba Diving
Aviation (scenic/joy flights)	Horseback/Camel Riding	Sea Kayaking
Ballooning	Jet Skiing	Skydiving
Bungy Jumping	Jet Boating/Ocean Rafting	Snorkelling
Canoeing	Kite Surfing	Surfing
Cycling/Mountain Biking	Parasailing	Whale/Dolphin Watching
Four Wheel Drive Excursions	Quad Biking	White Water Rafting
Gliding	Rock Climbing	Wildlife Swim Programs
Go-Karting	Rollerblading	Windsurfing
Hang Gliding	Sailing	Zorbing

Camel riding on Forty Mile Beach, Teewah

2 Vision

Queensland is to be recognised as the premier soft adventure destination in Australia, for both domestic and international visitation.

2.1 Goals and Measures

To assist Queensland in achieving its vision, the following goals and performance measures have been identified for the next three years (2008-2011).

1. Goal: Increase visitor expenditure and length of stay

Measure:

- Growth in visitor expenditure and average length of stay, by those who undertake adventure activities in Queensland

2. Goal: Ensure sustainable development of adventure tourism product

Measures:

- Stakeholder support and consideration of content of the Adventure Tourism Action Plan through references to the document in their strategic planning
- Development of product suited to the needs of the target market
- Increase in adventure tourism product that is "internationally ready"
- Reference to the Adventure Tourism Action Plan into Destination Management Plans and Regional Tourism Investment and Infrastructure Plans

3. Goal: Build awareness of Queensland adventure tourism product

Measures:

- Growth in media exposure and delivery of marketing activity targeting travellers wanting an adventure experience
- Growth in market share of adventure travellers compared to other Australian states

Abseiling at Kangaroo Point Cliffs, Brisbane

3 Target Markets

This section identifies and prioritises those market segments that provide the greatest potential for the growth of adventure tourism in Queensland. These segments have been identified by taking into consideration current target markets, as well as an analysis of Queensland's strengths, weaknesses, opportunities and threats (refer to section 7.2).

International

Queensland received 1.2 million international visitors who participated in adventure activities in the year ended December 2006 (64% of all adventure travellers to Australia).

The United Kingdom, Europe (not including UK and Germany) and Japan are currently the three largest source markets for international adventure travellers. The other resource markets include the United States of America, New Zealand, Korea and Germany.

The following international target segments, identified through a combination of Tourism Australia segmentation research and market intelligence (refer to section 6), represent the core consumers who have the most potential to participate in adventure activities in Queensland.

Target source markets are: United Kingdom; Europe* (excluding the UK and Germany); Japan; United States of America; New Zealand*; Korea* and Germany. The target segments within these source markets for the adventure sector are the Self Challengers.

There are variations within the Self Challenger segment between source markets however generally they "travel to fulfil an inner drive to challenge themselves and the reward is intensely personal" (Tourism Australia). Self Challengers tend to be more affluent, highly educated and have a wide range of interests compared to other segments. The market segment is not defined by age groups as they are identified through their shared motivations and attitudes towards travel.

For further information on Tourism Australia's segmentation approach refer to section 6.2.

* *Denotes that Tourism Australia segmentation data is not currently available for this source market.*

Domestic

Queensland received approximately 2.8 million travellers participating in adventure activities in the year ended December 2006 (23% of all domestic adventure travellers to Australia). The largest proportions of travellers were from Brisbane, Other Queensland, New South Wales and Victoria. These markets will continue to be targeted to grow domestic adventure visitation to Queensland. Within these source markets the adventure travellers tend to be 25-55 years old, have a higher than average income and travel with their spouse, family or friends.

It has been identified that there has been significant growth in the over 55 years age bracket. Therefore these travellers have been identified as a developing target market as they are an opportunity for increased visitation and visitor expenditure.

For those who seek adventure activities, holidays are about pushing boundaries through physically challenging activity. They enjoy the company of others, but their focus is on exploring the extremes of their physical environment and themselves. It's about feeling alive.

For in depth information on the characteristics and motivations of these international and domestic markets refer to section 6.2.

3.1 Competitive Positioning

The core positioning strategy for Queensland's adventure segment is to differentiate the state from key competitors by establishing a distinctive image based on its strengths and appeals, in consideration of the perceived needs and interests of the target markets. This positioning will be the focus of all tourism development and marketing activities and is the primary reference point for stakeholder planning initiatives.

Main Attributes and Appeals

- Range of adventure experiences offered state-wide
- Great Barrier Reef as a premier diving and snorkelling location
- Clusters of adventure products in key regions
- Tropical climate and warm weather
- Nature-based assets as the backdrop for adventure activities
- Relaxed and casual lifestyle

Queensland's Brand Personality

- Vibrant
- Warm and friendly
- Energetic and fun
- Colourful

Competitive Differences

- Great Barrier Reef
- Tropical climate and year round warmth
- Five World Heritage Areas and unique natural assets
- Existing quality support product

Queensland's Positioning Statement

Queensland is made for holidays. It offers a warm, relaxing, fun, vibrant and energetic experience – the ultimate pleasure holiday.

Adventure activities are an integral part of the Queensland experience and contribute to this overall positioning statement.

Domestic Positioning

The long term strategy is to position Queensland as the primary Australian state for soft adventure experiences. The Queensland climate, natural assets and World Heritage Areas contribute to the state's appeals as a nature-based destination that provides a range of adventure activities.

International Positioning

Queensland is to be positioned as the premier soft adventure destination in Australia and the hub of nature-based adventure activities. Key adventure experiences in the north and south of the state will be highlighted as well as the range of activities throughout Queensland.

Teewah Coloured Sands

4 Key Strategic Priorities

In terms of charting a direction for the next three years (2008-2011), Tourism Queensland and industry stakeholders have identified the following key strategic priorities for the adventure tourism sector, based on an analysis of the industry's Strengths, Weaknesses, Opportunities and Threats (refer to section 7.2). The priorities complement those in the Queensland Tourism Strategy.

1. Improve the profile of adventure tourism in Queensland

- Raise awareness of Queensland's adventure tourism experiences to encourage regional dispersal and increase visitation and length of stay.
- Focus on collaborative approaches to marketing and provision of appropriate information to key target audiences.
- Raise awareness of the safety and quality of Queensland's dive products.
- Dispel misconceptions of climate change impacts on the Great Barrier Reef and the Queensland dive experience.

2. Encourage development of sustainable product that delivers the Queensland adventure experience

- Ensure the long-term sustainability of the adventure tourism sector by encouraging the adoption of sustainable business practices.
- Identify and facilitate the development of new tourism adventure product and packages.
- Advocate climate change adaptation and mitigation initiatives for the industry, especially for the dive and snorkel segment.
- Encourage training and development opportunities to strengthen the professionalism and safety standards of the adventure tourism sector.
- Encourage the adoption of Adventure Activity Standards.

3. Improve industry cohesion and partnerships

- Facilitate the development of a cohesive industry sector, improving regional partnerships and cooperative product marketing at a local, regional and state-wide level.
- Improve communication and coordination of adventure tourism activities across the state.

4. Improve research availability

- Provision of consumer research in line with the needs of adventure tourism operators (qualitative and quantitative).
- Provision of market research into the quality and safety of the adventure tourism industry.

Sailing, Gold Coast

5 Actions to Achieve the Vision

The following strategies and associated actions have been developed following the identification of the key strategic priorities. As further research and market insights become available the actions may be amended.

Tourism Queensland will lead the overall implementation of this plan and the lead agency status for individual actions is highlighted in bold. For a full glossary of acronyms refer to the Appendix.

Strategy 1: Raise the awareness and strengthen the profile of Queensland as a soft adventure destination

ACTIONS		Responsibility/ Stakeholders	Completed by
1.1	Improve accessibility of adventure tourism content on TQ consumer websites including acquisition of adventure tourism operators into the Australian Tourism Data Warehouse.	**TQ**	Nov 2008 with annual updates.
1.2	Increase availability of suitable imagery to be used in adventure tourism marketing collateral	**TQ**	June 2009.
1.3	Attract relevant, high profile media and trade to participate in a suite of targeted adventure experience familiarisations in liaison with Tourism Australia's Visiting Journalist Program where appropriate.	**TQ**	Yearly programs 2008, 2009, 2010.
1.4	Provide media and trade with a suite of adventure experience itineraries, factsheets and product updates.	**TQ**, Adventure clusters	Dec 2008 with annual updates.
1.5	Implement international, cooperative Youth/Adventure marketing campaigns (in support of QTS Action 4.2.1).	**TQ**, Industry associations	Campaigns planned for each year 2008, 2009, 2010.
1.6	Implement targeted marketing and communication activities to dispel misconceptions of climate change impacts on the Great Barrier Reef and the Queensland dive experience.	**TQ**, RTOs, EPA	Yearly programs 2008, 2009, 2010.
1.7	Incorporate adventure tourism experiences in all relevant Brand Queensland marketing initiatives.	**TQ**	Yearly programs 2008, 2009, 2010.

White Water Rafting on Tully River

Strategy 2:	Encourage development of sustainable tourism product that delivers the Queensland soft adventure experience in line with market needs		
ACTIONS		**Responsibility/ Stakeholders**	**Completed by**
2.1	Identify adventure tourism product development opportunities, including suitable locations for adventure experiences in Protected Areas (in support of relevant QTS actions).	**TQ**, RTOs, RTIIP Steering committees, EPA	Dec 2009 with update Dec 2010.
2.2	Deliver climate change adaptation and mitigation program to the adventure tourism segment, with particular reference to the dive and snorkel market.	**TQ**	Yearly programs 2008, 2009, 2010.
2.3	Deliver a suite of targeted product development workshops for the adventure tourism industry, including: - International Market Readiness - Online Marketing - Eco Certification - Customer Service	QTIC, TQ, RTOs, Adventure clusters, EA, QORF	Yearly programs 2008, 2009, 2010.
2.4	Develop and implement state-specific Adventure Activity Standards in Queensland to increase the professionalism of the industry.	**Inter-departmental Committe lead by DSR**	Dec 2009.
2.5	Facilitate adventure tourism operators participation at a regional level in the Tourism Pipeline Project	**TQ**, QTIC, RTOs	2008 – 2010.

Strategy 3:	Improve Industry Cohesion and Partnerships		
ACTIONS		**Responsibility/ Stakeholders**	**Completed by**
3.1	Work collaboratively with Queensland's existing regional Adventure Tourism Clusters on targeted development, research and marketing activities	**TQ**, RTOs, Adventure clusters	2008 – 2010.
3.2	Integrate adventure tourism initiatives in existing planning frameworks such as Destination Management Plans and Regional Tourism Investment and Infrastructure Plans.	**TQ**	RTIIPs by 2009, DMPs by 2010.
3.3	Develop a database of all Queensland adventure operators, ensuring consistent, targeted communication.	**TQ**, RTOs, Industry associations	Dec 2008.

Strategy 4:	Improve research availability		
ACTIONS		**Responsibility/ Stakeholders**	**Completed by**
4.1	Conduct research into the dive and snorkel market to gain an accurate indication of the size, scope and preferences of this segment.	**TQ**, GBRMPA, WH&S, AMPTO	Feb 2008.
4.2	Conduct research into the quality and safety of the adventure tourism industry.	**Tertiary education provider**, QORF, TQ	Dec 2008.
4.3	Provide visitor profiles and segmentation information for the domestic consumer that undertakes adventure activities.	**TQ**, TA	Annually 2008, 2009, 2010.
4.4	Provide visitor profiles and segmentation information for the domestic consumer that undertakes adventure activities.	**TQ**	Dec 2008.
4.5	Audit current impediments and regulations affecting the adventure tourism industry and prepare a response to overcome the impediments.	QTIC, QORF, EPA, DTRDI, DSR, other industry associations	Dec 2010 in conjunction with implementation of Adventure Activity Standards (Action 2.4)

6 Research and Statistics

6.1 Trends and Insights

Demand – a growing market opportunity

Adventure tourism has been identified as one of the fastest growing tourism segments, with an ever-expanding variety of activities appealing to a growing audience.

Characteristics and preferences profile of the adventure traveller [ii]

- Adventure travellers tend to be 25-55 years old, however there is significant growth in numbers of adventure travellers that are over 55 years
- Income for these travellers is higher than average and many come from professional or managerial occupations
- Most are married and tend to travel with spouse or friends
- Generally males and females are equally represented, with participation varying by activity
- Most are well travelled and can be demanding. Whilst willing to pay, these travellers have high expectations of value and quality experiences
- They are seeking new and enriching experiences related to nature, adventure and culture
- They are looking for more exciting, authentic and challenging experiences, with an element or perception of risk
- Destinations are largely selected for scenery, the presence of certain physical features such as wildlife, waterways, mountains or unique experiences

Motivations [ii]

Most adventure travellers take an adventure holiday for a number of reasons, and as such there is considerable scope for the promotion of adventure tourism as part of a broader holiday experience.

Whist there is a lack of empirical research into consumer motivations for adventure travel due to the developing nature of the market, existing studies indicate the following to be the primary motivators:

- The element or perception of risk
- Discovering new experiences
- Increased sense of personal growth
- Fun and excitement
- Opportunity to experience a cross-section of activities
- Improved interpretation of the environment and culture
- Integrated, better travel opportunities

The emergence of an older travelling demographic and a changing attitude to growing old (or staying young) is resulting in increasing numbers of older participants in adventure activities, and not just at the soft adventure end of the scale. A key motivator with this growing demographic is the existence of interpretation or learning elements as part of their adventure experience; scuba diving on the reef guided by a marine biologist; a rainforest tour escorted by an indigenous guide explaining the cultural significance of the area.

The importance of opportunities for learning and personal growth cannot be underestimated and should be factored into the development of adventure experiences that meet the needs of this demographic.

Information Sources

General trends in tourism research are indicating an exponential growth in the use of online environments for travel research, independent packaging or tailor-making of holidays and now more importantly, purchase. Women are emerging as the principal decision makers in the determination of travel plans. These trends are no different for consumers seeking adventure tourism experiences.

The need for tourism operator websites to be highly professional, well designed and marketed has been identified as a significant factor for consumers when planning and booking trips.

6.1.2 Market Intelligence

Below is a summary of research available on the adventure market for the year ended December 2006. Any updated research is available on **www.tq.com.au**.

Adventure Market Snapshot

Based on the data available through existing International and National Visitor Surveys, for the purpose of this strategy, adventure travellers have been defined as those international and domestic visitors that participated in at least one "adventure activity" in Australia and in Queensland whilst on a holiday. Specifically;

- Bushwalking and/or rainforest walks
- Scuba diving
- Snorkelling
- Other outdoor activities (eg horse-riding, rock climbing, bungy jumping, four-wheel driving)
- Water activities or sports (eg sailing, windsurfing, kayaking)
- Surfing

International Adventure Travellers

(Source: International Visitor Survey, Tourism Research Australia)

In the year ended December 2006, there were 5.0 million international visitors to Australia. 36% of these visitors participated in adventure activities whilst on their holiday (1.8 million visitors). There was an overall average annual increase of 13.7% in the number of international adventure travellers between the year ended December 2004 and the year ended December 2006.

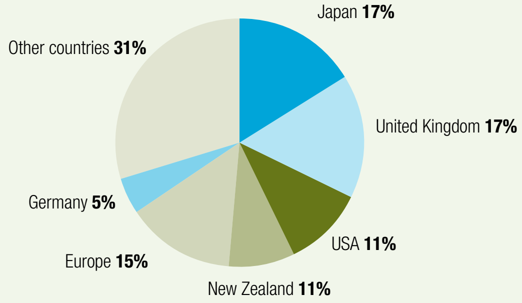
International Visitors to Australian states who participated in adventure activities

Queensland received the largest proportion of international adventure travellers in the year ended December 2006 with 64% (1.2 million) visiting Queensland during their trip to Australia.

International adventure travellers spent a total of 76.5 million nights in Australia during their trip, representing 49% of total international visitor nights.

The United Kingdom, Europe (excluding UK & Germany) and Japan are primary source markets for international adventure travellers.

Origin of international adventure travellers
Year Ended December 2006



* *Europe excludes the United Kingdom, Germany, Scandinavia, France, Italy, the Netherlands and Switzerland.*

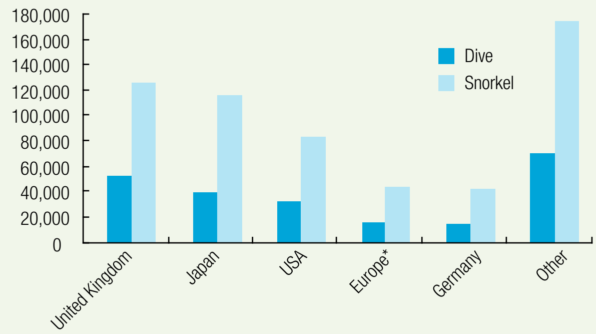
**Note – the above information relates to international travellers who participated in adventure activities during their trip to Australia, not necessarily in a particular state or region.*

Five percent of International visitors went scuba diving during their stay in Australia (254,400 YE December 2006), a slight increase (up 1.2%) in comparison to YE December 2004. 13% participated in snorkelling activity (666,900 YE December 2006), which represented an 8.7% increase on YE December 2004.

The United Kingdom, Japan and America are the primary market sources for both diving and snorkelling participants.

Queensland is certainly Australia's most popular diving destination, with 88% (224,600) of international visitors participating in scuba diving and 88% (588,900) of international visitors participating in snorkelling while visiting the state during their holiday to Australia.

International Visitors to Queensland who participated in Scuba Diving or Snorkelling during their trip
Year End December 2006



* *Europe excludes the United Kingdom, Germany, Scandinavia, France, Italy, the Netherlands and Switzerland*

The majority of international scuba diving visitors to Queensland were aged between 25-44 years (47%), with 38% aged between 15-24 years. International visitors who participated in snorkelling activity were more widespread in age with 45% of snorkelling visitors to Queensland aged between 25-44 years, 29% aged between 15-24 years, and 22% aged between 45-64 years.

Age of International Visitors to Queensland who participated in Scuba Diving or Snorkelling during their trip Year Ended December 2006		
Age Bracket	**Diving**	**Snorkelling**
15-24	86,344	169,175
25-44	105,543	267,869
45-64	28,571	129,009
65+	4,147	22,811
TOTAL	224,605	588,865

Slightly more men than women participated in scuba diving whilst on their trip (53%), with more women undertaking snorkelling activity (53%).

Domestic Adventure Travellers

(Source: National Visitor Survey, Tourism Research Australia)

12.0 million domestic visitors in Australia participated in adventure activities in the year ended December 2006, 16% of total domestic visitors in Australia.

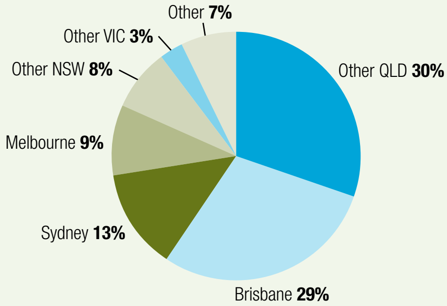
Domestic adventure travellers spent a total of 54.8 million nights in Australia during their trip, representing 19% of total domestic visitor nights.

New South Wales received the largest proportion of the domestic adventure travellers in the year ended December 2006 (34%), followed by Queensland (23%) and Victoria (21%).

Domestic Visitors to Australian states who participated in adventure activites

Of the domestic adventure travellers that visited Queensland (2.8 million), 59% were intrastate (29% from Brisbane, 30% other Queensland), followed by New South Wales 21%, (Sydney 13%, 8% other NSW) and 13% from Victoria (Melbourne 10%, other Victoria 3%).

Origin of domestic adventure travellers to Queensland
Year Ended December 2006



840,000 domestic visitors in Australia went scuba diving or snorkelling during their holiday in the 12 months to December 2006. Queensland received 51% of that market (429,000), which represents just over 2% of total domestic overnight visitors to Queensland.

Visitors from Queensland (51%), New South Wales (22%) and Victoria (5%) were the primary sources for diving and snorkelling participants. The majority of domestic visitors to Queensland who participated in diving or snorkelling were aged between 25-44 years (52%) with females representing 52% of participants.

6.2 Segmentation Profile

International

Internationally, Tourism Australia targets the Global Experience Seeker. The global experience seeker displays certain characteristics common to key international source markets including

- Experience in international travel
- Desire for authentic personal experiences
- Interest in engaging with locals and undertaking activities
- Interest in learning through participation in activities
- Places a high importance on value for money
- Places a high importance on engaging in experiences different to their usual day to day activity

The global experience seekers are typically

- From households with higher than average household income
- Tertiary educated
- Interested in world affairs
- Selective about their choice of media consumption
- Opinion leaders within their social groups

Of this segment, the “Self Challengers” are specially those travellers to which “travel fulfils an inner drive to challenge themselves and the reward is intensely personal”.

The Adventure Tourism market generally appeals to and seeks to meet the needs of the Self Challenger.

Communicating the experiences offered by Queensland and matching these with the needs of the market is essential to the growth of the industry.

For more information on the Global Experience Seeker please visit **www.tourism.australia.com**

Domestic

Tourism Queensland is currently exploring the segmentation profile of domestic travellers interested in adventure activities. Please refer to **www.tq.com.au** for more details.

6.3 Stakeholders and Partnerships

This action plan was developed in consultation with key stakeholders whose partnerships are critical to grow the adventure tourism market in Queensland.

Below is a list of some stakeholders for the adventure tourism market.

ACA	Australian Camps Association
AMPTO	Association of Marine Park Tourism Operators
BQ	Backpacking Queensland
DAN	Divers Alert Network Asia-Pacific
DQ	Dive Queensland
EA	Ecotourism Australia
EPA	Environmental Protection Agency
GCATG	Gold Coast Adventure Travel Group
GBRMPA	Great Barrier Reef Marine Park Authority
GOA	Guiding Organisation of Australia
NAUI	National Association of Underwater Instructors
OCA	Outdoor Council of Australia
PADI	Professional Association of Diving Instructors
QORF	Queensland Outdoor Recreation Federation
QTIC	Queensland Tourism Industry Council
RTO	Regional Tourism Organisation
SSI	Scuba Schools International
TA	Tourism Australia
TQ	Tourism Queensland
TRA	Tourism Research Australia
WPH&S QLD	Workplace Health & Safety Queensland
YATAG	Youth Adventure Tourism Action Group – Tropical North Queensland

Banana Boat, Great Keppel Island

7 Situation Analysis

7.1 Competitive Analysis

Supply – a solid product base

Queensland offers a divergent landscape ideal for a range of nature-based adventure tourism activities. Specifically, the Queensland setting offers

- Internationally recognised natural landscapes (rainforest, outback, beaches, oceans and reefs, mountains and plains)
- Five World Heritage Areas, over 200 national parks and an extensive list of state forests and natural marine parks
- Great Barrier Reef, world-class diving and snorkelling experiences
- Diverse native wildlife populations
- Tracks and trails for hiking, biking and trail riding at a variety of skill levels and trip lengths
- Rivers and waterways for rafting, canoeing and kayaking at a variety of skill levels
- Infrastructure in protected areas (roads, walking tracks, facilities)
- Strong regional access (transport infrastructure)
- Moderate climate with mild winters thereby providing year-round access to a diverse range of adventure activities
- A range of accommodation suitable for all types of adventure travellers

Competitive Positioning

Tourism operations in Queensland are professional, predominantly of a high standard and boast a strong track record of safe operation.

The adventure tour product on offer is world class and diverse from bungy jumping, skydiving, and white water rafting to rock climbing, sea kayaking and quad biking.

Diving and snorkelling is a major strength with the Great Barrier Reef, spectacular shipwrecks and warm southern waters offering a year round and high quality experience for all levels of experience.

With an already established group of adventure tour operators in key tourism regions, Queensland is also witnessing the emergence and increasing dispersal of new operators into other regions. This trend, as the following table indicates, is ensuring that a wide variety of adventure activities are available across all regions in the state.

Canoeing on Lake Coorioibah, Tewantin

	Brisbane	Bundaberg	Central Queensland	Gold Coast	Fraser Coast	Mackay	Outback	South East Queensland Country	Sunshine Coast	Townsville	Tropical North Queensland	Whitsundays
Abseiling/Rappelling	✓		✓	✓			✓	✓	✓	✓		
Aviation (scenic/joy flights)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Ballooning	✓			✓				✓	✓		✓	
Bungy Jumping				✓	✓				✓		✓	
Canoeing/Kayaking	✓		✓	✓	✓		✓	✓	✓	✓	✓	✓
Cycling	✓	✓	✓	✓	✓		✓	✓	✓		✓	
Four Wheel Drive Excursions	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Gliding	✓	✓	✓					✓	✓			
Go-Karting	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓
Hang Gliding	✓			✓				✓	✓		✓	
Hiking/Bushwalking	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Horseback/Camel Riding	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓
Jet Skiing	✓		✓	✓	✓				✓	✓	✓	✓
Jet boating/Ocean Rafting	✓		✓	✓	✓				✓		✓	✓
Kite surfing	✓			✓		✓			✓		✓	
Mountain Biking	✓		✓	✓				✓	✓		✓	
Parasailing	✓		✓	✓	✓	✓		✓	✓		✓	✓
Quad Biking	✓		✓								✓	✓
Rock Climbing	✓		✓	✓			✓	✓	✓	✓		
Rollerblading	✓			✓						✓		
Sailing	✓	✓	✓	✓	✓	✓			✓	✓	✓	✓
Scuba Diving	✓	✓	✓	✓	✓	✓			✓	✓	✓	✓
Sea Kayaking	✓		✓	✓					✓	✓	✓	✓
Skydiving	✓	✓	✓	✓	✓			✓	✓	✓	✓	✓
Snorkelling	✓	✓	✓	✓		✓			✓	✓	✓	✓
Surfing	✓	✓	✓	✓					✓			
Whale/Dolphin Watching	✓		✓	✓	✓				✓			✓
White Water Rafting										✓	✓	
Wildlife Swim Programs				✓					✓		✓	
Windsurfing	✓	✓	✓	✓	✓	✓			✓	✓	✓	✓
Zorbing				✓								

7.2 SWOT Analysis

The following SWOT (Strengths, Weaknesses, Opportunities and Threats) table is categorised into:

Internal factors – The 'strengths' and 'weaknesses' within the adventure market, its strategies and its position in relation to its competitors.

External factors – The 'opportunities' and 'threats' presented by the external environment and the competition.

Adventure Tourism:

Internal Strengths	Internal Weaknesses
• Diverse landscape, unique World Heritage Areas • Variety of product, appealing to a broad audience • Strong safety record • Year round accessibility to adventure activities • Strong regional dispersal of adventure activities • Internationally recognised icon the Great Barrier Reef – World Heritage listed • Other protected marine park areas (such as Great Sandy & Moreton Bay) with quality dive sites • Diversity of experiences to attract broad audience eg. excellent wreck dives • Well-structured, professional operations • Climate – year round availability of water-based activities	• Limited industry cohesion • Emergence of new & immature businesses (standards, quality, training) • Limited marketing activity - low consumer awareness of existing product • Low perception of Queensland as an 'adventure holiday' destination • Perception of mass market diving on the Great Barrier Reef • Lack of consolidated and easily accessible information on diving in Queensland • Low consumer awareness of existing product and regional diversity
External Opportunities	**External Threats**
• Shift in national & state tourism marketing focus to experiences • Growth in consumer demand for experiences • Accessibility of new technology (online marketing environment) • Industry cluster development • Co-operative marketing and packaging • Development and/or discovery of new dive sites • Increasing interest in dive tourism from southern regions • Range of diving-related experiences available, (opportunity to capture non divers, snorkellers, experienced divers)	• Local competition – other states positioning as adventure destinations (Tasmania, Victoria, Northern Territory) and internationally, New Zealand • International perception of Australia as no longer "adventurous" • Environmental degradation and climate change • Over-regulation in response to incidents (restricting access, increasing costs of compliance) • Increasing cost of insurance policies for operators

Challenges and Opportunities

Based on the SWOT analysis a number of challenges and opportunities have been identified in the development of this Action Plan, and will need to be taken into consideration to ensure the successful delivery of the strategic priorities outlined above.

Proactive Development and Marketing

Limited cohesive and focussed marketing and overall promotion of adventure in Queensland has resulted in low consumer awareness of the diversity of adventure product available. There is an opportunity to strengthen the perception of Queensland as a nature-based adventure destination.

The recognition of online media as an important tool in marketing adventure tourism product also cannot be underestimated due to the exponential growth in the use of online environments for travel research and purchase.

The development and packaging of product that meets the evolving needs of the adventure tourism market including the incorporation of cultural and learning experiences, recognition of the emergence of an aging demographic, and the need to develop product that caters for these trends needs to be considered by industry.

Cohesive Partnerships

At a regional level, the development of adventure clusters can be hindered by a lack of cohesion between operators. A co-operative approach to marketing and promotional activity would maximise opportunities and successfully capitalise on a destination's strengths.

An opportunity exists to cultivate better linkages between industry and government facilitating not only improvements in resource sharing but also co-operative resolution of regulatory concerns, ensuring a balanced approach to adventure tourism development.

Collaborative projects between industry and government such as the sinking of the ex HMAS Brisbane off the Sunshine Coast in 2005, not only assist in raising awareness of lesser known dive destinations but also play a significant role in strengthening and developing the dive industry.

Strong industry partnerships with Protected Area Managers such as the Great Barrier Reef Marine Park Authority, Queensland Parks and Wildlife, conservation and research bodies are critical for the future development of the industry and ongoing management of impacts on the reef and marine areas.

Adoption of Sustainable Practices

The rapid growth of adventure tourism as well as nature-based and ecotourism has greatly increased the demand for commercial and private recreational use of national parks, marine parks, conservation reserves and other natural environments.

An increased focus is needed on the development and management of product that facilitates

- Tourism growth within sustainable carrying capacities
- Community engagement mitigating impact and ensuring the respect of local cultures
- Education of consumers on their responsibilities in relation to the impacts of tourism on the environment
- Adoption of sustainable practices in tourism business operations.

There is a need to encourage industry uptake of the ECO Certification program, working co-operatively with Ecotourism Australia to raise awareness of the benefits associated with undertaking certification including, better business practices, additional marketing opportunities and possible extended tenure on permits through Protected Area Managers.

Queensland's commitment to the sustainable use of natural resources is outlined in theme five of the Queensland Tourism Strategy.

As highlighted in the Queensland Tourism Strategy (action 5.1.3), it is also important for the dive industry to be aware of climate change and its predicted implications to allow for effective business planning.

The Queensland dive industry is stringently regulated and as a result, is considered one of the safest dive destinations in the world. The high cost of compliance however, has impacted on Queensland's competitive positioning with Asian and other Pacific destinations. There is a need for industry to work cohesively with government, monitoring and minimising further regulatory impacts that may be detrimental to the market.

Professionalism and Standards

Adventure tourism operators are experts in their field, but often have limited understanding of the broader tourism industry, lack of experience in strategic business planning, product development and marketing.

Ready access to information and research, business management training, specialist tourism workshops addressing distribution systems as well as product packaging and pricing strategies should be considered to manage possible inefficiencies in these areas.

Whilst awareness of the importance of industry initiatives that assist in the development and management of operational standards is growing, uptake of industry certification programs such as ECO Certification remains comparatively low when looking at the entire sector.

Discrepancies exist between adventure operations in relation to the maintenance or improvement of operational principles such as monitoring customer satisfaction, staff training and development and adherence to voluntary, industry driven standards.

To address this need, the Tourism Pipeline project has been developed to assist small and medium sized enterprises to overcome their growth challenges through an integrated process of mentoring, counselling, workshops, training and networking. A key focus is to highlight and encourage industry to access the range of extensive business development resources and services available, including those offered by the Department of Tourism, Regional Development and Industry.

As a key element of adventure tourism is the inclusion of the element or perception of risk or danger, industry safety standards are vitally important. Generally there is a high level of safety throughout the industry however it is recognised that continual improvement in standards is important. Currently under consideration by an Inter-Departmental Committee, with representation from a variety of government agencies and chaired by the Department of Sport and Recreation are the Adventure Activity Standards (AAS). The AAS have recently been developed in Victoria and other Australian states and are voluntary guidelines for undertaking potentially risky activities. The standards cover essential business practices including leader competency, activity planning, emergency procedures, equipment, and commitment to environmentally sustainable practices. As the AAS provide a grade for the minimum standards of organisations when conducting adventure activities, the adoption of them in Queensland would undoubtedly benefit the industry.

Profile of Diving

There is low consumer awareness of the diversity of dive experiences and destinations due to the following factors:

- Limited promotion of diving opportunities in the Great Barrier Reef outside of Tropical North Queensland;
- Lack of tourism focus by dive operators in Southern Queensland, Mackay and Whitsundays diving destinations.

The increasing popularity of Asian and other Pacific dive destinations is having an impact on visitation, with other destinations perceived as cheaper and more exotic.

Public perception in relation to the extent of damage to the Great Barrier Reef from coral bleaching events, outbreaks of the Crown of Thorns Starfish and climate change also needs to be countered, through education and awareness.

8 Implementation, Monitoring and Evaluation

The Adventure Tourism Action Plan will guide the planning processes of Tourism Queensland. The strategies will form the basis of the annual business plans for the team over the next three years (2008-2011). Any significant changes in the market during this time will be reflected in these business plans.

The Adventure Tourism Action Plan will be used as a basis to engage key stakeholders in the adventure sector and ideally guide the planning processes for the existing and future adventure cluster groups.

Tourism Queensland will work closely with key partners to deliver on the actions according to the time frames and responsibilities set out in section 5. The implementation of the strategies will be monitored and evaluated primarily through the progress of Tourism Queensland's business plans, progress of the adventure cluster groups and initiatives implemented by key industry partners.

Underwater Diving, Great Barrier Reef

Twin Falls, Cape York

Appendix

Data Sources

References

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Glossary of Terms

AAS	Adventure Activity Standards
AMPTO	Association of Marine Park Tourism Operators
DQ	Dive Queensland
DSR	Department of Sport and Recreation
DTRDI	Department of Tourism, Regional Development and Industry
EA	Ecotourism Australia
EPA	Environmental Protection Agency
QORF	Queensland Outdoor Recreation Federation
QPW	Queensland Parks and Wildlife
QTIC	Queensland Tourism Industry Council
QTS	Queensland Tourism Strategy
RTIIP	Regional Tourism Investment & Infrastructure Plans
RTO	Regional Tourism Organisation
SRQ	Department of Sport and Recreation Queensland
VJP	Visiting Journalist Program
TA	Tourism Australia
TQ	Tourism Queensland
TRA	Tourism Research Australia
SWOT	Strengths, Weaknesses, Opportunities and Threats
WH&S	Workplace Health and Safety